

**MASSACHUSETTS STATE ETHICS COMMISSION**  
**ONE ASHBURTON PLACE – ROOM 619**  
**BOSTON, MA 02108-1501**  
**(617) 371-9500**

RECEIVED  
STATE ETHICS COMMISSION

2010 MAY 25 AM 10: 38

**STATEMENT OF FINANCIAL INTERESTS FOR CALENDAR YEAR 2009**

Please provide the requested information. As required by G.L. c. 268B, the Financial Disclosure Law, you must answer all questions to the best of your knowledge. If your answer to any question is "none" or if any question is not applicable, check "Not Applicable." If extra space is needed to complete a response, attach additional pages, clearly noting the question to which the information relates. If the Commission needs to contact you regarding this form, we will use the contact information provided in Question 1.

**1: Reporting Data**

**REDACTED**

Person Reporting:	Deval L. Patrick
Address:	
City:	
State:	
Zip:	
Home Phone:	
Office Phone:	
Email:	
Name of spouse residing in your household:	
Names of dependent children residing in your household:	

**2: Candidate: I am a candidate for the following office:**

Office:	Governor
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**3: Positions Held**

Agency in which you served:	Executive
Your Position:	Governor
Start Date:	January 4, 2007
End Date if Applicable:	
Amount of Income Earned in 2009:	\$100,000 or more (actual 2009 - \$133,327)

4: Other Government Position(s)

√ Not Applicable

5: Employment and Other Associations with Businesses and Non-Governmental Entities (Including Non-Profit Organizations)

Name of Business:	Chevron USA, Inc.
Address:	P.O. Box 6041 San Ramon, CA 94583
Position Held:	Former Senior Executive at Texaco Group, LLC, acquired by Chevron USA, Inc. (Resigned in 2001)
Filer or Immediate Family member:	Filer
Gross Income (Filer Only):	\$1,001 to 5,000 (actual 2009 - \$3,079)

Name of Business:	Ropes & Gray
Address:	One International Place Boston, MA 02110
Position Held:	Partner
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

Name of Business:	United Way of Massachusetts Bay
Address:	51 Sleeper Street Boston, MA 02210
Position Held:	Director
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

Name of Business:	Jane Doe, Inc.
Address:	14 Beacon Street – Suite 507 Boston, MA 02108
Position Held:	Board Member
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

**Deval L. Patrick**  
**Statement of Financial Interests**

Name of Business:	The Posse Foundation, Inc.
Address:	14 Wall Street – Suite 8A-60 New York, NY
Position Held:	Board of Directors
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

Name of Business:	Epiphany School
Address:	154 Centre Street Dorchester, MA 02124
Position Held:	Board of Overseers
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

Name of Business:	Boston Symphony Orchestra
Address:	301 Massachusetts Avenue Boston, MA 02115
Position Held:	Board of Overseers
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

Name of Business:	Lawson & Weitzen LLP
Address:	88 Black Falcon Avenue Boston, MA 02210
Position Held:	Intern
Filer or Immediate Family member:	Immediate Family Member
Gross Income (Filer Only):	

6: Business Ownership/Equity

√ Not Applicable

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7: Transfer of Ownership/Equity Interests

√ Not Applicable

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8: Leaves of Absence

√ Not Applicable

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9: Gifts

√ Not Applicable

10: Honoraria

√ Not Applicable

11: Reimbursements

√ Not Applicable

12: State or Local Government Securities

√ Not Applicable

13: Securities and Investments

	<u>Issuer</u>	<u>Description</u>	<u>Owner</u>
1	Delaware Dividend Income Fund	Mutual Fund	Family Member
2	Legg Mason Clearbridge Aggressive Growth Fund	Mutual Fund	Family Member

14: Business and Charitable Trusts

√ Not Applicable

15: Business and Charitable Trust Assets

√ Not Applicable

16: Family Trust Assets

Securities and other investments are held in a "blind trust."

17: Realty Trusts

√ Not Applicable

18: Realty Trust: Real Property Assets

✓ Not Applicable

19: Business, Charitable and Realty Trusts: Mortgage Obligations

✓ Not Applicable

20: Business, Charitable, Family and Realty Trusts: Purchases/Transfers of Property  
(In Massachusetts Only)

✓ Not Applicable

21: Business, Charitable, Family and Realty Trusts: Sales/Transfers of Property  
(In Massachusetts Only)

✓ Not Applicable

22: Real Property Owned In Massachusetts

Address:	Home Address
Description of Property:	Principal residence
Persons Holding Interests	
Record Owners:	Deval L. Patrick [REDACTED]
Assessed Value:	\$100,000 +

Address:	[REDACTED]
Description of Property:	Residential
Persons Holding Interests	
Record Owners:	Deval L. Patrick [REDACTED]
Assessed Value:	\$100,000 +

23: Business, Investment and Rental Properties

✓ Not Applicable

24: Real Property Purchases

✓ Not Applicable

25: Real Property Sales

√ Not Applicable

26: Mortgage Information

Primary Residence - Address of Property:	Home address
Creditor Name:	SunTrust Banks
Creditor Address:	303 Peachtree Street NE Atlanta, GA 30308
Terms of Repayment Interest Rate:	30-year, ARM note at 4.125%
Year Mortgage Due or Terminated:	2033

Primary Residence - Address of Property:	Home address
Creditor Name:	Bank of America
Creditor Address:	100 Federal Street Boston, MA 02110
Terms of Repayment Interest Rate:	Home Equity Line of Credit, variable rate
Year Mortgage Due or Terminated:	Revolving Line of Credit

Address of Property:	[REDACTED]
Creditor Name:	Berkshire Bank
Creditor Address:	24 North Street Pittsfield, MA 01202
Original Amount Borrowed (Filer Only):	\$100,000 +
Amount Owed:	\$100,000 +
Terms of Repayment Interest Rate:	30-year, ARM note at 5.75%
Year Mortgage Due or Terminated:	2037

27: Mortgage Receivable Information

√ Not Applicable

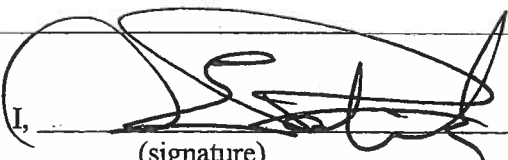
28: Other Creditor Information

√ Not Applicable

29: Debts Forgiven

✓ Not Applicable

30: Certification

I, , certify under the pains and penalties of perjury that:

(signature)

- I made a reasonably diligent effort to obtain the required information concerning myself and IMMEDIATE FAMILY MEMBER(S); and
- The information provided on this form and any attachments is true and complete, to the best of my knowledge.

Submitted 24 May 2010  
(date)

The following IMMEDIATE FAMILY member(s) declined to disclose information which is necessary to complete this Statement fully and accurately.

(Not Applicable)

The following are the specific question(s) for which information could not be obtained from an IMMEDIATE FAMILY member(s):

(Not Applicable)

The following are the specific question(s) which I decline to answer in whole or in part, because I assert the information is privileged by law:

(Not Applicable)

Please explain the basis of your claim of privilege:

(Not Applicable)